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FISHING INDUSTRY OF IRELAND, 1972

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IRELAND
Fishing Ports

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FISHING INDUSTRY OF IRELAND, 1972

Salvatore Di Palma

SUMMARY

During 1972, the Irish fishing industry continued its measured but steady growth. The value of landings reached US$17.4 million. Herring accounted for much of the increase over 1971. Herring, salmon, and lobster products contributed to record fishery exports valued at US$18.6 million. Imports also rose and were worth US$8.7 million; fish meal and canned salmon were the main items.

Entry into the European Economic Community (EC) required a reorientation of industry goals and changes in regulations. Although some opposition was voiced against entry, advantages in marketing and other areas are believed to outweigh possible competition inside the Irish 6- to 12-mile fishing zone.

Outlook for the future is for continued expansion and higher exports. Foreseen difficulties are insufficient fleet personnel and increased competition in nearby waters from foreign fishermen.

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LANDINGS

During 1972, Irish landings of herring and other pelagic species rose sharply and offset a decline in landings of cod, haddock, and other demersal species (table 1). Total value of marine fish and shellfish reached a record US$12.5 million compared with US$10.8 million in 1971. The salmon catch, which is not included under marine landings, was valued at an estimated US$4.9 million, up from US$3.3 million the previous year. As usual, herring was the leading species accounting for 40 percent of the marine catch by value. Despite lower landings, cod, haddock, and plaice were the main demersal fish taken. Various species of lobsters also were important in the Irish catch, accounting for US$2.3 million or 18 percent of the total.

The 1972-73 winter herring season was the most valuable ever. Markets in other parts of Europe were very good, and prices were high. A familiar scene were trucks loaded with fresh, iced, Irish-caught herring being driven via ferry and highway to France and other countries on the continent.

THE INDUSTRY

Five major fishing centers--Killybegs, Galway, Dunmore East, Howth, and Castletownbere--are envisioned in government development plans; work is well along at these, as well as lesser fishing ports along the Irish coast. The new shore facilities and processing plants have been a boon to Killybegs in the economically depressed County Donegal in the Northwest.

The Irish fishing fleet is still primarily an inshore fleet, comprising small to medium fresh fish vessels which stay out less than 24 hours as a rule. In 1973, the fleet of vessels with inboard engines included 30 vessels over 75 GRT, 245 vessels from 26 to 75 GRT, and 732 craft 25 GRT and under. A number of shipyards, established or expanded under the fishery development plan, have built most of the new vessels; only a few boats have come from abroad.

The fish and shellfish processing industry is marked by new facilities, found all along the coast. These range from plants producing frozen and cured products to holding ponds for shellfish. The processing side, like the fishing side, is still noteworthy by the absence of large-scale, integrated, industrialized operations found in neighboring countries.

Three major ports of County Donegal in northwestern Ireland (Killybegs, Burtonport, and Greencastle) produce better than one-third of Ireland's total seafish landings. Donegal has a positive, progressive attitude toward the fishing industry. Strong cooperative movements are responsible for much of the progress in each of the three major ports. In addition, there has been large investment and reinvestment in both the primary and processing sectors of the fishing industry, and Donegal fishermen are learning modern techniques of fishing, navigating, and processing.

Killybegs, the largest port in County Donegal, continues to grow. The fleet has increased in recent years to more than 50 vessels, most of which are over 70 feet long. The value of landings have increased to more than US$2 million annually. Killybegs now has several operational fish processing plants and a fish meal plant with capacity of 250 tons per day. Killybegs exported salted and spiced herring worth US$370,000 to Scandinavia.

Burtonport, though less developed than Killybegs, has progressed considerably in recent years. A US$452,000 harbor improvement is in progress. Some 65 full- and part-time vessels operate out of Burtonport. These vessels landed fish worth US$760,000 in 1971. Burtonport has three processing plants that prepare the bulk of the landings for export.

Greencastle, a much smaller port, is destined to remain so unless necessary harbor improvements, especially dredging to handle larger fishing boats, are undertaken. Excellent-quality white fish such as cod and haddock is Greencastle's primary fish product. Most of the white fish is shipped to British markets. Greencastle's landings are worth better than US$370,000 per year.

The fishing industry accounts for about 25 percent of County Donegal's economy. The most important fish in the Donegal area is herring. About 10,000 tons of the 27,000 tons of herring caught by Irish fishermen in 1971 were landed in Donegal. Total herring exports rose 32 percent in 1971 to US$4.5 million. Salmon is the next most important fish in Donegal. Most of the salmon and herring is exported. Haddock and whiting, both fresh and frozen, are sold on the Irish market.

Continuing rapid improvements and modernization of the fishing fleets and harbors bodes extremely well for the Donegal fishing industry. The potential for future developments is good.

Table 1.--Ireland landings of fish and shellfish, 1971 and 1972

Species	1971		1972	
	Metric tons	US$1,000	Metric tons	US$1,000
Demersal:				
Cod	3,420	854.5	2,778	757.9
Haddock	6,037	823.7	4,758	698.9
Plaice	1,649	772.1	1,403	632.4
Ray/skate	1,462	450.1	1,336	432.6
Sole, dover	165	222.1	205	300.8
Whiting	4,923	498.0	3,958	457.8
Other demersals	3,005	433.0	2,683	404.6
Total demersals	20,661	4,053.5	17,121	3,685.0
Pelagic:				
Herring	31,250	2,965.1	47,847	4,973.1
Other pelagic	8,636	453.1	10,721	505.7
Total pelagic	39,886	3,418.2	58,568	5,478.8
Shellfish:				
Lobster:				
Homarus	1/	879.2	1/	879.6
Nephrops	1,774	589.6	1,823	799.7
Palinurus	1/	599.5	1/	604.0
Periwinkles	1,791	287.9	2,176	295.4
Scallops	1/	283.0	1/	187.0
Other shellfish	1/	697.0	1/	564.0
Total shellfish	1/	3,336.2	1/	3,329.7
Total, marine species	1/	10,807.9	1/	12,493.5
Salmon 2/	1,500	3,315.0	1,760	4,935

NOTE: Preliminary statistics - data for eels & trout not included.

1/ Data given in numbers rather than in weight. Data cannot be added.
2/ Estimates for salmon from other Fishery Division source.

Source: Statistics Section, Fisheries Division, Department of Agriculture and Fisheries, Dublin.

EXPORTS AND IMPORTS

During 1972, exports of fish and shellfish rose to US$18.6 million compared with US$14.7 million in 1971 (table 2). Salmon, herring, and lobster products again accounted for much of the exports. The United Kingdom continued to be the largest market, taking US$6.8 million worth or 36 percent. France and West Germany increased their purchases, and Sweden was added to the list of buyers of Irish cured herring.

During 1972, Irish exports of fresh and preserved herring reached the highest level in more than 20 years. Herring exports totaled 37,187 metric tons, up 33 percent from 1971 and valued at US$8 million. The principal countries buying herring are normally large herring producers themselves. The export boom reflects a general European shortage of herring, with record prices being offered for the product. This has encouraged the Irish herring fleets to take advantage of the occasion. The main export markets for fresh and frozen herring were W. Germany (5,400 tons), the Netherlands (5,000 tons), Britain (2,000 tons), and Norway (600 tons). Cured herring were sold to the Netherlands (6,000 tons), Poland (4,000 tons), and Norway (3,000 tons). Exports of herring have increased steadily; last year's exports were more than four times the volume of 10 years ago.

Export promotion has been an integral part of the overall Irish fishery development plan. Recently, a regional fisheries attache was placed in Paris to promote sales of Irish fish and shellfish on the continent. The Market Development Board of the Irish Sea Fisheries Board has been working cooperatively with the industry in an intensive market development program at home and abroad. In 1969 Ireland's total fish exports were worth US$8.4 million. By 1972, exports were more than doubled.

Ireland also imports substantial amounts of fishery products (table 3). In 1972, imports were worth US$8.7 million compared with US$7.1 million the previous year. Fish meal accounted for a large part of the imports; canned salmon is another major import.

Table 2.--Ireland exports of fish and shellfish, 1972 and 1971

Product	1971		1972	
	Metric tons	US$1,000	Metric tons	US$1,000
ish, fresh, chilled or frozen:				
Eels	117	196.4	89	145.7
Herring	9,391	1,989.0	19,326	4,441.5
Salmon	1,059	3,271.6	1,108	3,978.6
Other	2,707	1,180.6	2,674	1,168.0
ish, dried, salted or smoked:				
Herring	14,994	2,483.7	17,861	3,546.1
Salmon	30	201.4	26	162.2
Other	69	30.6	351	117.5
hellfish, fresh, frozen or cured:				
Lobster (Homarus)	195	793.0	179	824.8
Lobster (Nephrops)	307	260.1	113	190.3
Lobster (Palinurus)	147	632.4	149	632.2
Periwinkles	2,326	497.3	2,446	531.1
Other	2,019	606.9	1,511	643.9
ish meal	1,572	354.5	1,872	399.5
ther fish & shellfish	1,845	2,236.4	1,076	1,833.0
Total	36,778	14,733.9	48,781	18,614.4

urce: Irish Trade Statistics

Table 3.--Ireland imports of fish and shellfish, 1972 and 1971

Product	1971		1972	
	Metric tons	US$1,000	Metric tons	US$1,000
Fish, fresh or frozen	3,903	1,394.8	1,192	1,428.8
Fish, cured	1,238	747.2	1,396	930.6
Canned fish:				
Salmon	748	1,331.1	795	1,534.6
Other	373	466.6	517	582.8
Shellfish	526	678.3	505	902.4
Fish meal	11,566	2,412.3	17,448	3,268.8
Other	66	63.8	91	82.2
Total	18,420	7,094.1	21,944	8,730.2

urce: Irish Trade Statistics

ENTRY INTO THE EUROPEAN ECONOMIC COMMUNITY (EC)

The most noteworthy development affecting the fish industry during 1972 was completion of negotiations for Irish entry into the EC on January 1, 1973. Access to the EC markets should prove profitable to Irish fishermen. The shellfish industry will especially benefit because high EC duties on mollusks and crustaceans will be gradually eliminated for Irish products.

Numerous meetings were held during 1972 between representatives of government and industry to discuss and prepare for entry into the Community. Most elements favored entry because of readily foreseen benefits to fish sales, but a few were concerned about permitting fishermen from other EC nations to fish inside the 12-mile zone along part of the coast. Once entry was approved, however, discussions turned to measures necessary to adapt to the EC fishery policy and to expand markets. A special program was initiated to educate the industry on the complex EC regulations.

Despite benefits, including price guarantees that are derived from the EC Producer Organization (PO) scheme, Irish fishermen had failed to agree to a PO as of March 1973; high current prices and the usual independent attitude are noted as reasons for the fishermen's failure to establish a PO. At an April 1973 meeting, representatives from fishery cooperatives have suggested establishment of four POs based on a regional structure.

INVESTMENT OPPORTUNITIES

During 1972, the Irish fishing industry continued the measured but steady growth experienced over the past decade. Ireland, with 2,000 miles of coastline close to rich fishing grounds, has opportunities for development of commercial fisheries. In recent years, government policy encouraged the expansion of commercial fisheries and substantial investment was put in fishing vessels and gear and in shore-based facilities. Total landings have been increasing, and this growth has been accompanied by parallel development in processing, distribution, and marketing facilities.

In 1964, a team of experts from the United States fisheries agency surveyed the commercial potential of Irish fisheries. The study led to the conclusion that great opportunities for development of a profitable commercial fishing industry existed in Ireland. The advantage of a location closer to major fishing grounds than some other nations and low labor costs made it economically feasible. Harbors have since been constructed at strategic points on the coast with services for fishing vessels. Ireland is well located near to the U.K. and European markets with direct shipping and container services for rapid and inexpensive transport of goods. Adequate labor is available with facilities for training.

The Irish Fisheries Board, the prime mover in the government's fisheries development program, gives incentive grants for new fishing vessels. Loan financing is also available. Companies setting up operations are allowed

10 year's exemption from income tax and corporation profit tax on profits from exports of manufactured products. No payroll, capital, or capital gains taxes are charged.

Under a trade agreement with Britain, fish and fishery products of Irish origin are exempt from British customs duties and have free access to the British market.

According to the Board, the Continental Shelf to the West and South of Ireland varies up to 200 miles in width and provides extensive fishing grounds within reasonable distance of Irish ports. These fishing grounds, together with the Irish Sea on the East, contain a wide range of species of pelagic and demersal fish and shellfish. In recent years, only 15 percent of all seafish taken in Irish coastal waters was landed by Irish vessels; the rest was taken by fleets of other European countries in sea areas contiguous to the Irish coast.

The demersal fishery includes whiting, cod, haddock, hake, plaice, ray, skate, soles, brill, and turbot. Apart from whiting, which is fished throughout the year, and cod, which is heavily fished between January and April each year, the Irish catch of demersal fish has been small. Catches by foreign vessels off the Irish coast have, however, been extensive. This is particularly true of hake. The concentration of hake tends to be in areas off shore beyond the range of most of the Irish fleet. Ireland has access to stocks of flatfish, such as plaice, soles, brill, and turbot. The quality of demersal fish landed in Ireland is high because fishing grounds are close to shore, and the trips are short.

Historically, herring and mackerel fisheries have been the major fisheries of Ireland. The winter herring fishery at Dunmore East on the South-East Coast produces up to 20,000 tons of herring during a short inshore herring season. Herring landings in Killybegs/Burtonport in the North West can exceed the Dunmore East catch, and, as a result, the port of Killybegs has attracted a wide range of shore activity and a number of fish processing factories. Because of Dunmore East's proximity to Europe, fleets from several nations including Belgium, England, France, Germany, and Holland operate off the South East coast during the herring season and, in addition, there is a shuttle service in herring-lugger traffic from the port to the Continent. Dunmore East, like Killybegs, is now undergoing major reconstruction as a fishing port, a development that will add to its stature as an international herring center. Herring usually school heavily from September to February, but they are available all the year in waters near the Irish coast. Present indications are that this fishery can be expanded substantially.

Vessels from several nations fish mackerel off the southern coast of Ireland. This species is available in Irish waters throughout the year. Concentration are heavy near the coast in spring and autumn each year.

The shellfisheries are close to shore. Prospects appear good for greater use of these stocks and an extension of fishing for certain species in deeper offshore waters.

Lobsters are fished extensively close inshore, particularly on the South, West, and Northwest coasts. The value of landings is increasing annually. The offshore fishery in all areas remains undeveloped. A similar situation applies in the crayfish fisheries. The crab population is not harvested to any extent; work undertaken recently to obtain further information regarding stocks and meat yields has resulted in successful commercial development of the fishery. The catch of Dublin Bay Prawns (Nephrops) is only a fraction of the potential landings. In waters adjacent to the Irish coast, French fishermen alone take 10 times as many prawns as the Irish.

The waters and bays of Ireland and the temperate climate that prevails offer opportunities for the development of fisheries for mollusks. Water temperatures (which range from a mean 90° C. in January to 15° C. in August) indicate that growth rates may exceed those in most European countries. The Fisheries Development Division of the Irish Sea Fisheries Board will assist potential investors by providing comprehensive information on the opportunities.

All coasts in Ireland have good concentrations of industrial fish, and foreign fish meal firms are showing increasing interest in these resources. The raw material consists mainly of herring, sprat, mackerel, sand eels, and the waste fish caught incidental to the food fisheries.

Ireland is well provided with natural deep harbors. At five locations, the government is now developing major fishery centers that will meet the requirements of a modern fishery industrial enterprise. Besides safe berthage and efficient discharge and fitting-out facilities, developed land will be available for industrial sites. The five fishery development centers are in the South West, Galway on the West Coast, and Howth on the East Coast. Such commercial ports as Limerick and Sligo on the West Coast; Cobh, Cork, and Waterford on the South Coast; and Dublin and Drogheda on the East Coast all meet the basic requirements for fishery industrial development. Facilities on a more limited scale are available at Burtonport in the North West; Greencastle in the North; Dingle, Cahirciveen, Schull, and Baltimore in the South West; Kilmore Quay in the South East; and Skerries and Clogherhead on the East Coast.

Ireland has some 5,500 fishermen--1,700 full-time and 3,800 part-time. The part-time fishermen, many of whom work agricultural small holdings, provide a pool of potential vessel crews. Sea fishing is a family tradition with them, and experience has shown that these people make excellent crew and officer material.

Industry growth continues to be supported by the Board Iascaigh Mhara (B.I.M. or Irish Sea Fisheries Board). B.I.M. is a state development corporation; its four main development divisions deal with fisheries (resource), home and export market, investment (industry), and boatbuilding.

The traditional government agency for fisheries is the Fisheries Division of the Department of Agriculture and Fisheries. Among the Division's responsibilities are scientific research, international affairs, and freshwater fisheries including salmon, training, and statistics.

FINANCIAL ASSISTANCE

The industry has benefited from a number of financial arrangements for the purchase of vessels and the building of facilities. For example, a purchaser of a 66- to 90-foot vessel receives an outright grant of 25 percent of the costs, needs only to put down as little as 5 percent, and is given a loan on the remaining at 4 percent interest over 10 years. Furthermore, when a new boat credit is cleared within 10 years, 10 percent (of the original cost) incentive grant is given. Grants allocated for capital purposes during 1971/72 totaled US$1.0 million. The allocation was US$1.8 million for 1972/73, and the projection for 1976/77 is US$3.2 million. Through the Irish Industrial Development Authority, new industrial enterprises are eligible for nonrepayable cash grants, up to 50 percent of the fixed assets in some areas. Foreigners setting up new firms in Ireland are granted a 15-year relief for taxes on profits.

FISHING LIMITS

Ireland claims 3-nautical-mile territorial waters and exclusive fishing rights between 3 and 12 miles. Several countries have traditional fishing rights to certain stocks in the 6- to 12-mile zone; EC countries have fishing rights inside the 6- to 12-mile zone along specified areas of the coast.

Hardly any serious demands are heard from the industry for increased Irish control of fisheries off the coast of Ireland. More concern is expressed about increased fishing that is permitted in the 6- to 12-mile zone to other EC fishermen under the EC fishery policy and, about competition by fishermen from other countries operating inside the zone under a prior agreement.

OUTLOOK

The outlook for the Irish fishing industry continues to be promising. Despite recent growth, Irish fishermen still take only an estimated 15 or so percent share of the resources in nearby waters. The physical side of the industry should expand easily with encouragement from present highly profitable operations and with continued government interest as indicated by a large increase in capital grant aid projected for 1976/77. There should be little trouble in marketing Irish fishery products in other countries at good prices. In addition, much more could be done to expand the reduction fishery in order to meet Irish demands which now must be satisfied by large imports.

The main difficulties will be fishery personnel. Most fishermen now stay out less than 24 hours at any time. If the basically inshore fishing effort is to expand to a nearshore effort on the outer edges of the Irish continental shelf, it will be necessary for the fishermen to stay out several days. The fishermen may be reluctant to remain at sea more than a day. This reluctance plus greatly improved opportunities on shore may present the fishing industry with serious manpower shortages.

Another potential troublespot may arise if large EC and other European vessels, now being eased out of areas like the Icelandic and North African fishing grounds, decide to fish waters off the Irish coasts more extensively.